

This Month

- **Right People**
- **Right Roles**
- **Right Time**

People Challenge

A major factor in the ability of our law firm strategy, business objectives and performance achievement is the availability of the right people in the right roles and at the right time – well managed and motivated.

At the time of the recession back in 2008 many high performers kept working with a low profile and observed how the management of the firm were managing staff, imposing disciplines and making redundancies. When the market changed many of the observers left their firm and went elsewhere.

The pandemic and lock down over the last two years have had a similar effect that will be felt soon but also a much broader effect where staff are reviewing work: life balance, flexibility over work location, handling work and domestic stress – also the younger generation are observing management techniques and communication, approaches to diversity and equality and the firm's social conscience.

Many firms are finding it hard to recruit currently and many staff may well be on their way when we start to recover

Yes, there are many working methodologies that can change such as outsourcing across all functions of the business but this needs to be evaluated as clear added value, which can be justified. The serious needs for client and prospect empathy and relationships certainly needs the right people as does management and motivation.

The Start

We do need to start at the top of the organisation

Partners, owners and managers need to be open with one another in terms of their likes and dislikes of aspects of management, the ideal roles for themselves – management or fee earning and client relationships and retirement plans and ideals. The business strategy can then be agreed and shared which includes resource and succession planning. This then enables the firm to make some decisions about resource needed now, whether there is time to facilitate the development of junior staff into bigger roles or whether skills of a particular level are need now on a full, part-time or consultancy/temporary basis.

This strategy needs constant review as with the market and the economy potential fluctuations whether the firm needs five or ten conveyancing staff is a very difficult call. Also demonstrates a need for effective business development and an eye on all that affects gross profit % achievement and cash flow.

Once the structure is agreed then a key role is an update of the job descriptions for all staff whether managers, fee earners, support roles, BD, Finance and so on. Key accountabilities should be very clear along with targets and the appropriate MI and BI in place for measurement and communications. Informal and formal looks at this data should be on a monthly basis so the right sort of nudging or assistance can be considered – it is surprising how informal early morning chats next to the coffee machine can assist.

One of the most dynamic job descriptions and accountabilities is that of the legal HOD as with acceptance of the accountabilities the breadth of operational understanding is hiked along with the time given to staff in a positive way.

Recruitment Plus

Having decided on the job roles needed to be recruited we have to broaden the search methodology for new employees. This of course bears in mind whether we are going to develop stars in house or recruit just for experience. Something that on board staff also find important. Past performance is obviously very important along with number of years PQE but.....

Not part of a traditional job description is a candidate profile often considered when looking to recruit someone – sometimes applied –

For example

- **Communication skills** needed – reading, writing, presentations but also empathy with for example clients or other staff members and questioning ability to identify issues. Does the person need to be able to get favours from non-line managed people?
- **Intellectual skills** needed – goes beyond qualification but includes the ability to assimilate the needs and then select and present the relevant solutions from the portfolio. Plus, to ask for and handle objections
- **Management skills** needed – people yes maybe but also a case file or a project on time and within budget
- **Motivation factors** – is the person turned on by exceeding targets and the potential reward or by client satisfaction, team work or social and community involvement, personal development desire
- **Emotional factors** – is the person available to be able to work within the environment, changing all the time at the moment, commit the hours and the travel necessary to do the job

When in the recruitment market it is essential that these additional factors are covered in interviews with open questions needing much more than a yes/no answer. Very few people are 100% which is absolutely fine but it enables the firm to be aware of slight adjustments to management and supervision plus training and development needs

The Plus bit

As well as mentioning the regular performance monitoring, mentoring and encouragement. Some of the more progressive in people development make the assessments for existing staff with a proactive audit of existing staff. Done in the right way a great motivational discussion between manager and staff member to help create their personal development programmes or indeed find a more suitable job role and method of working. If this is done across the firm then it enables a planned and therefore economic training and development programme conducted for some in house or for others external courses. This can cover everything from time management, division of labour, systems usage, enquiry conversions, client communications – all giving a ROI on Revenue, Gross Profit, Net Profit and Cashflow.

Appraisals

Viewed by many as something that is a pain and has to be done every year but if we are proactive as suggested – clear targets, the right MI and BI, informal and formal communication at least monthly

and for the younger generations weekly – then the formality takes on a completely different perspective.

The appraisee should be in a position to complete draft one of the appraisals prior to the formal meet because there is absolute clarity on performance throughout the year against the accountabilities. Areas defined previously for enhancement have been actioned and development programmes undertaken. It is much more constructive than someone finding out at an appraisal that the boss/firm is fed up with activity and performance in certain areas.

The appraiser and appraisee should be able to agree on performance against key accountabilities and improvement tasks

1 = Poor, 2 = needs improvement, 3 = meets requirements, 4 = consistently exceeds, 5 = excellent all the time

Likelihood of development and response to remedial action

E = Immediate remedial action required, D = will never be more than OK performer, C = meets job expectations, B = with development in 12 months could be in a higher of different role, A = should be promoted now

The results of the appraisal should be then discussed between the appraiser and another appropriate director for moderation purposes and again allow the firm to look at firm wide or individual personal development programmes.

A team of multiple C3 and B4 is a great combination

Bill Kirby is a director of www.professionalchoiceconsultancy.com and www.protemexecutiveconnect.com offering advice to firms on business issues from strategy, planning, business development, the effective use of IT applications and IT hosting for compliance, business continuity and DR. He can be contacted at billkirby@professionalchoiceconsultancy.com